

# **Session #11**

## **Using EDEExpress for New FAAs**

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**U.S. Department of Education**



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**GO FURTHER**  
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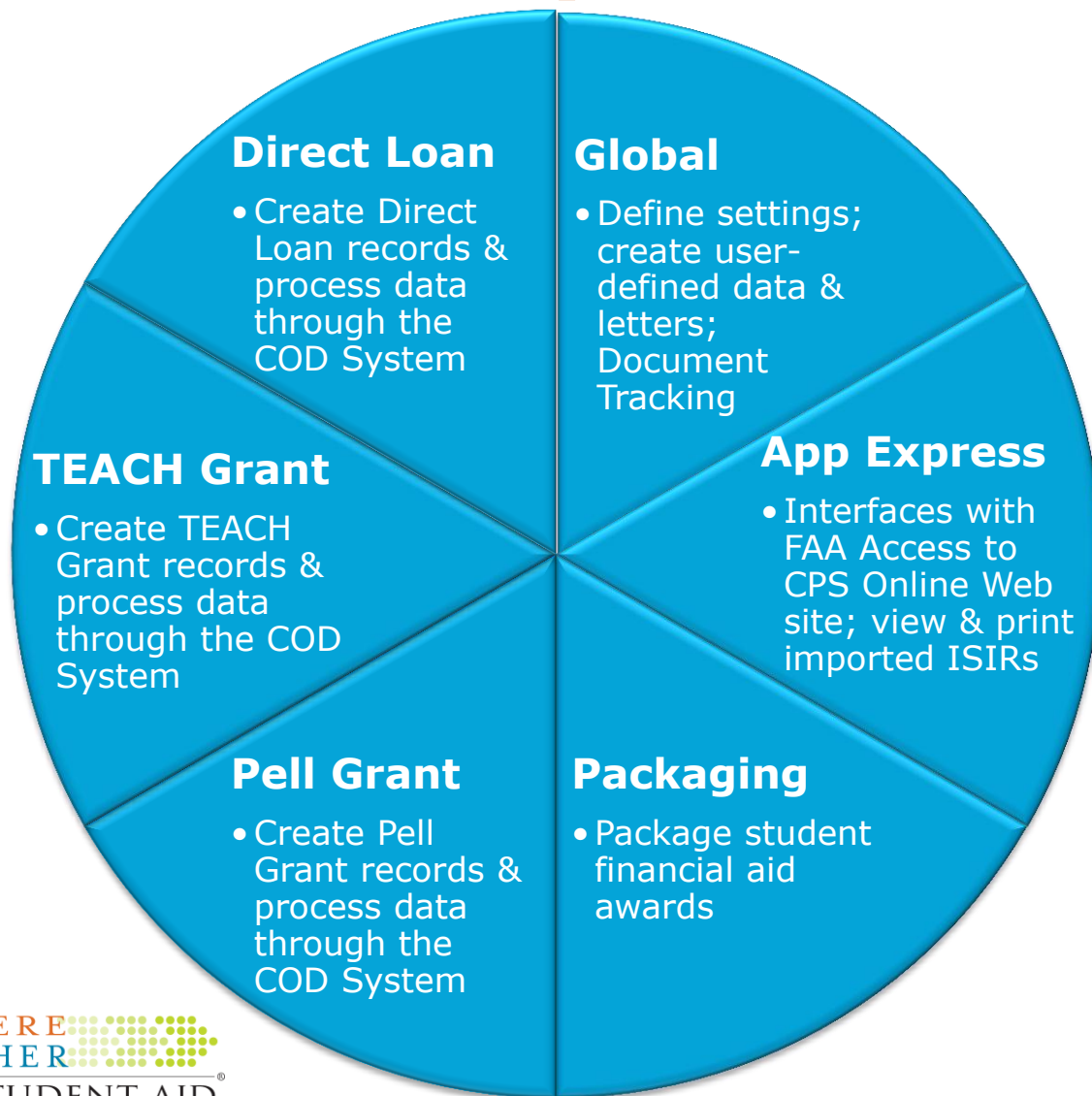
# Agenda

- Overview of EDEExpress
- Ins and Outs of EDEExpress
  - Time-Saver Setup
  - Entry/Import
  - Export
- Tools to Help Manage EDEExpress Data
  - Reports
  - Query
  - Browse
- Highlights of What's Coming in 2011-12 EDEExpress
- Where to Obtain Additional Help/Training

# What is EDEExpress?

- EDEExpress is:
  - A fully integrated software package that allows schools to process, package, and manage student financial aid records electronically
  - Award-year specific
  - Easy-to-use Windows format
- EDEExpress Release 4.0 2010-11 software and documentation on:  
[www.fsadownload.ed.gov](http://www.fsadownload.ed.gov)

# Modules of EDExpress

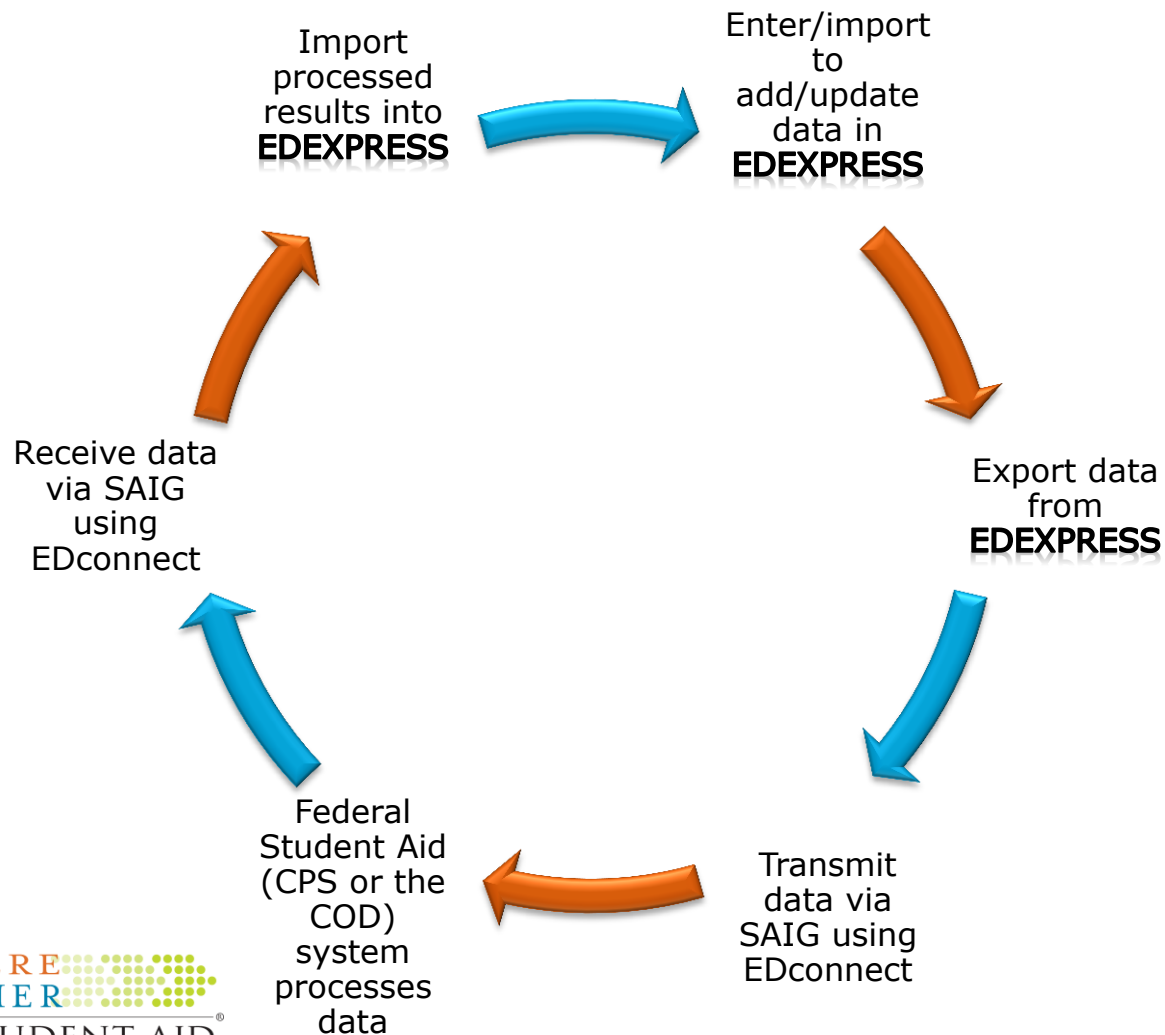


# The Goal – Aid to the Student

- Use Global, App Express, and Packaging to gather necessary information for determining a student's federal aid eligibility
- Use Pell, Direct Loan (DL), and TEACH Grant (TEACH) to disburse federal aid to the student

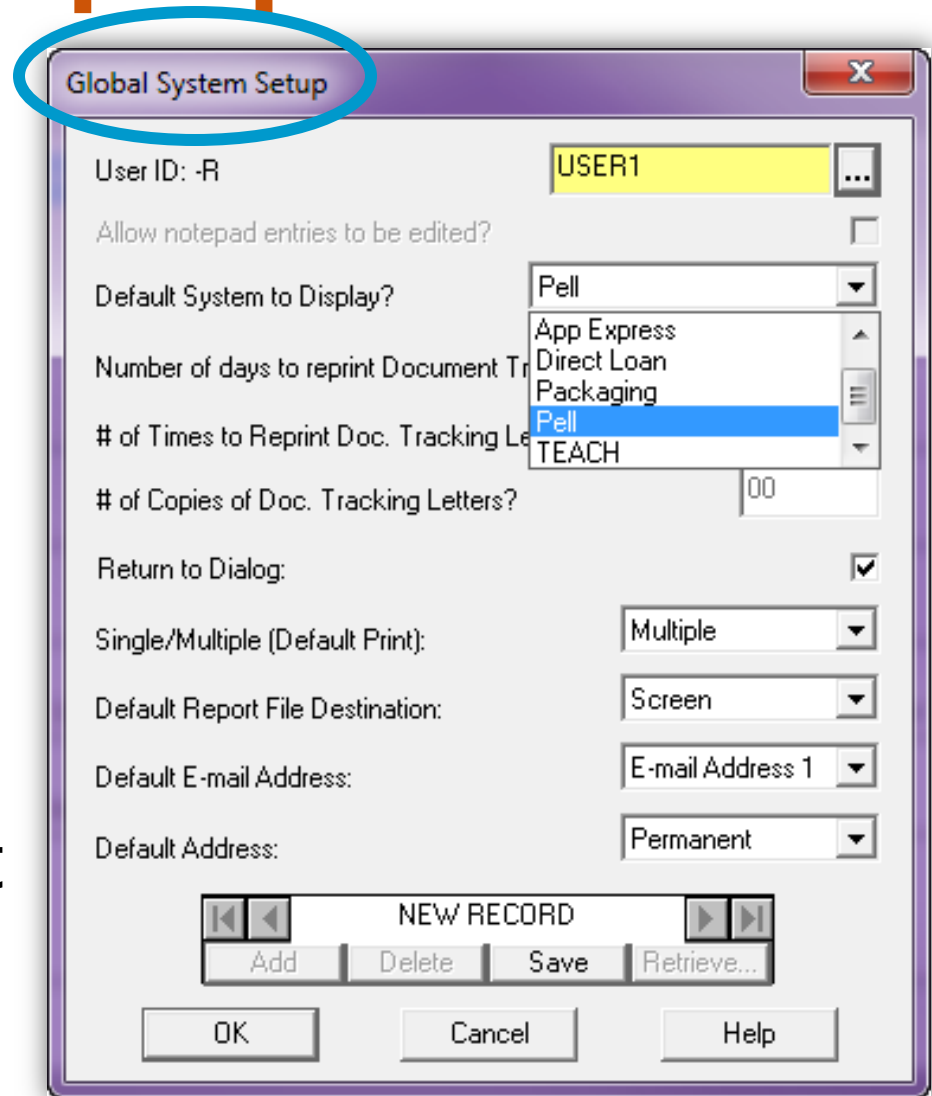
# Where does EDEXpress fit in?

## Six-Step Process for Sending & Receiving Data



# Time-Saver Setup Options

- Customizable by EDEExpress user ID
- What system will you use the most?
- Will you usually print out multiple records or a single record?
- Do you usually print to screen first?



# Entering & Updating Records

## Manual Entry

- Least efficient way to create or update multiple records but useful for a smaller set of records

## ISIR Import

- Efficient way to add records to your database for students who have applied for financial aid by completing the FAFSA

## External Add/Change Import

- Efficient way to move data from another school system into EDEExpress for processing





# Manual Entry

- Begin with Demographic (Demo) tab record
  - Tracks student's personal data (such as name, address, SSN)
- Packaging, DL, Pell, and TEACH records can all be entered manually once a Demo record is created
  - All linked to one Demo record for each student

# EDExpress and FAA Access

- Enter FAFSAs in FAA Access using the FAFSA tab in a student's record
  - Data from the Demo tab is transferred to the student's FAFSA in FAA Access
- Enter corrections in FAA Access on the Student Inquiry tab in a student's record
- When a student's record is not open, you can also connect to FAA Access Main Menu, ISIR Analysis Tool, and Return of Title IV Funds on the Web through the View menu

# ISIR import

Import  
ISIR file  
from CPS

- Creates Demo record (if no Demo exists)
- Data for all ISIR transactions is stored
- View and print ISIRs

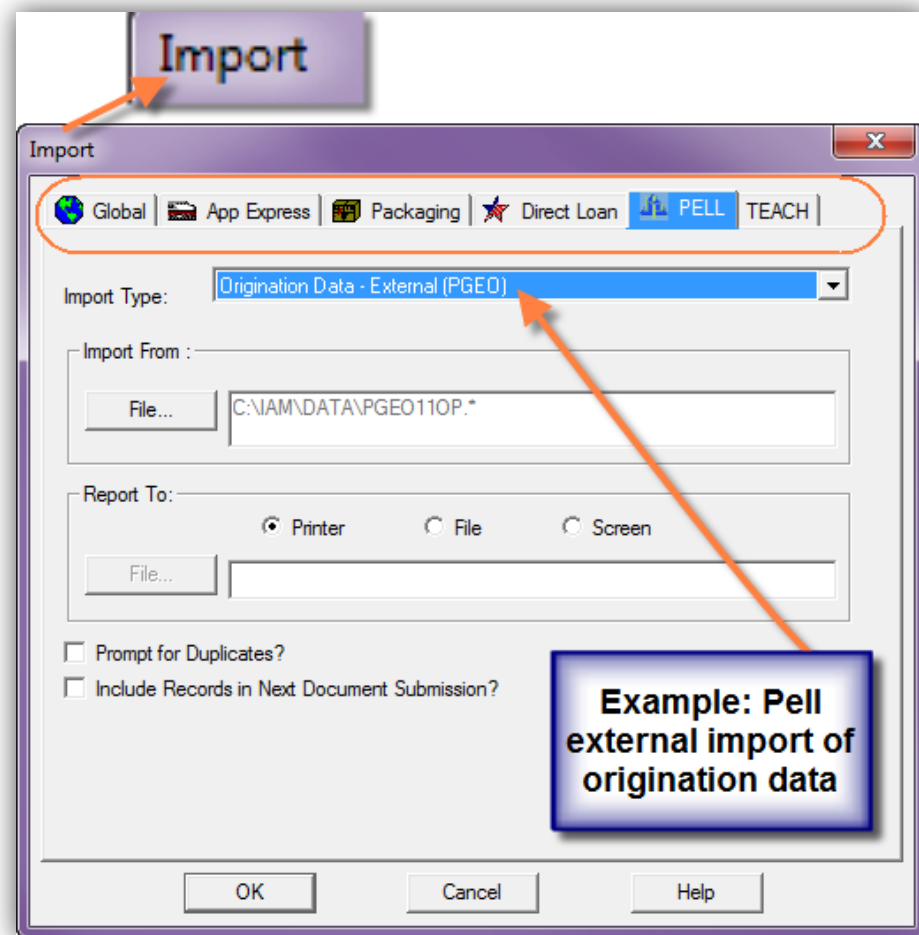
Then...  
import data  
from ISIR  
to create

- Packaging record
- DL records
- Pell record
- TEACH record



# Data from External System

- Import all types of records from an external system
  - Demographic Data
  - Packaging Data
  - Loan Data
  - Pell Data
  - TEACH Data
- ISIR Data only from ISIR files from CPS



# Why Import External Data?

- Ability to import non-federal aid award amounts into packaging for inclusion in packaging process
- For DL, Pell, and TEACH records
  - If all required data is imported, the records are ready to export to the COD System
  - Use EDEExpress as “XML translator” for your Common Record files if your own system is not XML-compatible

# Files for External Add/Change

- Each type of external import file has a specific record layout
- Demographic Data record layout is found in EDExpress
  - Print|Global|RL – Import Demographic Data

The screenshot shows the 'FSA DOWNLOAD - SOFTWARE & MANUALS' page from the U.S. Department of Education. The page has a blue header with the FSA logo and a search bar. A left sidebar contains 'Site Navigation' (Home, Site Map, Software, References, Privacy Act, Help) and 'Related Services' (FSA Enrollment, Mailbox, Subscribe to the FSATECH Listserv). The main content area lists several technical references with arrows pointing to specific sections:

- Pell, Direct Loan and TEACH Grant external add/change record layouts are found in the COD Technical Reference, Volume 3, Section 3** (points to 'COD Technical Reference 2010-2011')
- Packaging external add/change record layouts are found in the EDExpress Packaging Technical Reference** (points to 'EDExpress Packaging Technical Reference 2010-2011')

Other visible links include 'CPS Test System 2011-2012', 'NSLDS for FAAs', and 'Other Dept. of ED Links'. Descriptions for the COD and EDExpress references are provided on the right side of the page.



# Export and Send to COD

- After DL, Pell, and TEACH Grant origination and disbursement records are entered and ready, export them to the COD System via SAIG using EDconnect
- Informs COD System you are giving the student the federal aid they are eligible for



# Receive Results from COD

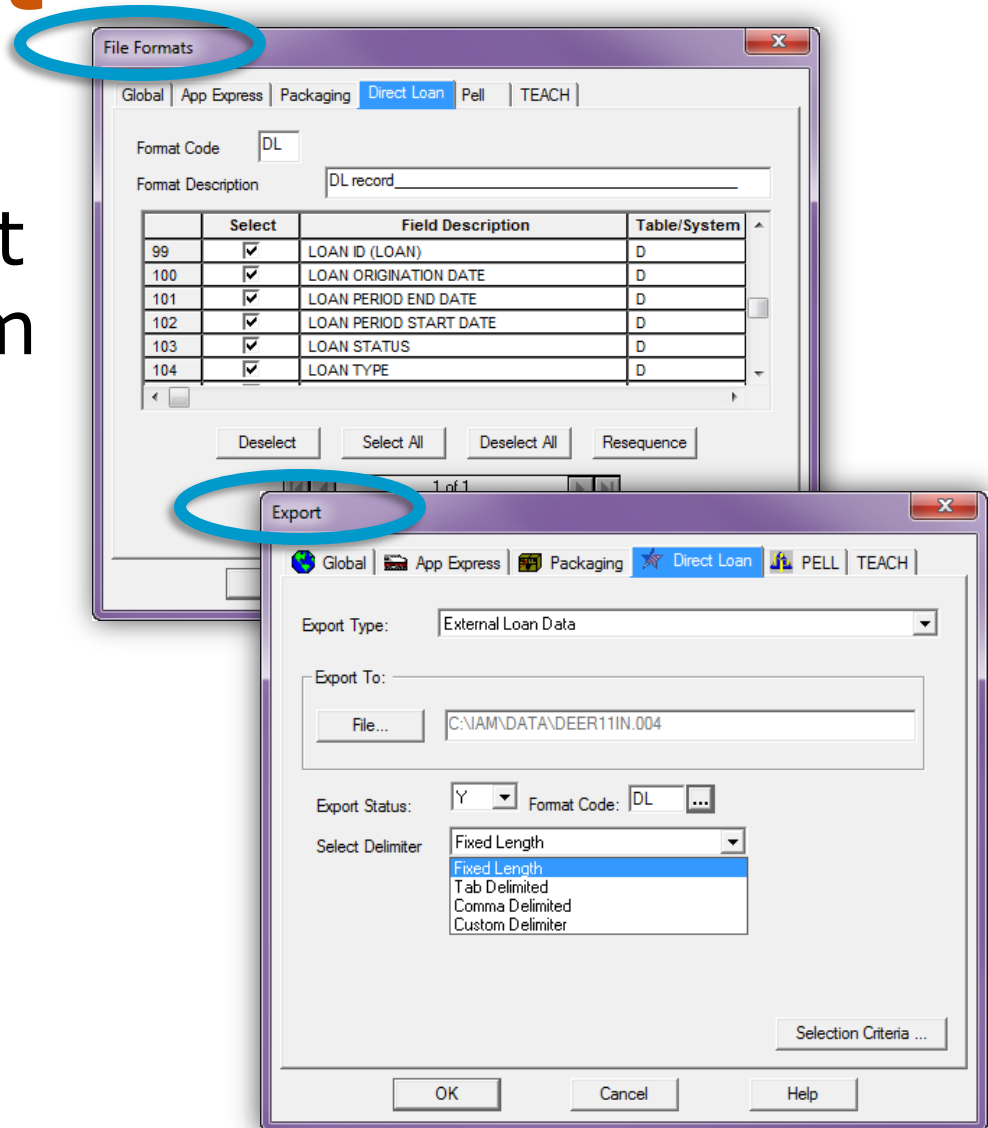
- COD Common Record response is created when the COD System has processed data for the student record
- Receive and import the COD Common Record response to update the EDEExpress record with the processed results





# External Export

- Use File Formats and External Export to extract data from EDEExpress for use in your school's system
- Choose only the data you need
- Available in all modules



# EDExpress Reports

- Multiple EDExpress reports are available to help you manage your student records
- Reports can be printed for multiple student records or for a single student record
- Use filtering and query capabilities to narrow report output to specific student populations or datasets

# EDExpress Reports

## Student Summary

- Available from every tab in global print function and within a student record

### Example of Beginning of Report

```
Report Date: 09/28/2010    U.S. DEPARTMENT OF EDUCATION    PAGE: 1
Report Time: 14:41:10      EDEXPRESS - 2010-2011
                           Student Summary

THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT
*****

Name: PERIWINKLE, DAVID
Original SSN: 999-99-0004
Current SSN: 999-99-0004
Date Of Birth: 08/03/1979
E-mail Address 1:
E-mail Address 2:

ISIR TRANSACTIONS

Transaction ID      Primary EFC      Secondary EFC
-----
999-99-0004 PE 01      0              0

Active: 01
Paid On:
```



# EDExpress Reports

## Student Summary

### Example of 2<sup>nd</sup> Part of Report

#### FUNDS AWARDED

Transaction #: 01

| Fund Description      | Decision | Current Amount | Previous Amount | Original Amount |
|-----------------------|----------|----------------|-----------------|-----------------|
| PELL                  | Accepted | \$5,550        | \$0             | \$5,550         |
| SUBSIDIZED            | Accepted | \$4,500        | \$0             | \$4,500         |
| TEACH GRANT           | Accepted | \$4,000        | \$0             | \$4,000         |
| UNSUB                 | Accepted | \$6,000        | \$0             | \$6,000         |
| Total Amount Awarded: |          | \$20,050       | \$0             | \$20,050        |

#### DIRECT LOANS (which have been disbursed)

| Loan ID               | CPS Trans # | Loan Amount Approved | Actual Disb Gross | Actual Disb Net |
|-----------------------|-------------|----------------------|-------------------|-----------------|
| 999990004S11G00824001 | 01          | \$2,500              | \$1,250           | \$1,244         |

#### PELL GRANTS (which have disbursements)

| Award ID                | CPS Trans # | Award Amount For Entire School Year | Anticipated Disb | Actual Disb |
|-------------------------|-------------|-------------------------------------|------------------|-------------|
| 999990004PE201100082400 | 01          | \$5,550.00                          | \$0.00           | \$2,775.00  |



# EDExpress Reports

## ISIR and List-Processed ISIRs

- Available from App Express tab in global print function

Report Date: 09/28/2010 U.S. DEPARTMENT OF EDUCATION PAGE: 1  
Report Time: 14:18:46 EDEXPRESS - 2010-2011  
PROCESSED RECORDS LIST

SORT: SSN

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| LAST NAME                                      | FIRST NAME | MI | SOCIAL SECURITY NO | TRANS #/TYPE | PROCESSED DATE | EFC    | VER | VTF  |
|--|------------|----|--------------------|--------------|----------------|--------|-----|------|
| SPECIAL  | FIRST      | A  | 999-99-0001        | 01/4A        | 01/01/2010     | C      | N   |      |
| COMMENT CODES: 050,001,024,146,115,257,258,006 |            |    |                    |              |                |        |     |      |
| LNAME  | FIRST NAME |    | 999-99-0002        | 01/4A        | 01/01/2010     | 8595C  | N   | 0395 |
| COMMENT CODES: 112,001,146,115,116,118,006     |            |    |                    |              |                |        |     |      |
| BLUE   | BECKY      |    | 999-99-0003        | 01/4A        | 01/01/2010     | 11181C | N   | 1360 |
| COMMENT CODES: 112,001,146,115,118,255,256,006 |            |    |                    |              |                |        |     |      |
| PERIWINKLE                                     | DAVID      |    | 999-99-0004        | 01/4A        | 01/01/2010     | 0C     | N   | 1235 |
| COMMENT CODES: 149,001,115,257,258,006         |            |    |                    |              |                |        |     |      |
| Totals:  |            |    |                    |              |                | 4      |     |      |



# EDExpress Reports

## Origination & Disbursement Lists

- Available in DL, Pell, and TEACH modules
- In general, origination lists include for each student: name, record ID (Loan ID, Award ID), record statuses, award amount, and other information specific to the type of award record
- In general, disbursement lists include for each student: name, disbursement numbers, amounts, statuses and other information specific to the type of award record





# EDExpress Reports

## Student Records in Document

- Available from COD tab in global print function

### Example of Detail in Report

Report Date: 09/28/2010 U.S. DEPARTMENT OF EDUCATION PAGE: 1  
Report Time: 13:26:08 EDEExpress - COD - 2010-2011  
List - Student Records in Document Sort: Last Name

THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT  
\*\*\*\*\*

DOCUMENT ID: 2010-07-09T12:20:42.7110000824

| Student's Name<br>PLUS Borrower's Name<br>Award ID/Loan ID | Student's<br>Current SSN<br>Program | Origination | Disburse | Change |
|--|-------------------------------------|-------------|----------|--------|
| BEIGE, IAN C.<br>999990006S11G00824001                     | 999-99-0006<br>Direct Loan          | N           | Y        | N      |
| BLUE, BECKY<br>999990003S11G00824001                       | 999-99-0003<br>Direct Loan          | N           | Y        | N      |
| GREEN, NATHAN<br>999990009U11G00824001                     | 999-99-0009<br>Direct Loan          | N           | Y        | N      |
| KHAKI, ALAN W.<br>999990011P11G00824001                    | 999-99-0011<br>Direct Loan          | N           | Y        | N      |



# EDExpress Reports

## Student Records in Document

### Example of Totals in Report

| DOCUMENT TOTALS                              |    |
|--|----|
| Total # Unduplicated Students:               | 12 |
| Total # Award IDs/Loan IDs in Document:      | 12 |
| Total # DL Origination Records:              | 0  |
| Total # Subsidized Origination Loans:        | 0  |
| Total # Unsubsidized Origination Loans:      | 0  |
| Total # Grad PLUS Origination Loans:         | 0  |
| Total # PLUS Origination Loans:              | 0  |
| Total # DL Disbursement Records:             | 12 |
| Total # DL Change Records:                   | 0  |
| Total # Pell Award Records:                  | 0  |
| Total # Pell Disbursement Records:           | 0  |
| Total # ACG Award Records:                   | 0  |
| Total # ACG Disbursement Records:            | 0  |
| Total # National SMART Award Records:        | 0  |
| Total # National SMART Disbursement Records: | 0  |
| Total # TEACH Grant Award Records:           | 0  |
| Total # TEACH Grant Disbursement Records:    | 0  |





# How do I...

## Only work with specific records?

- Use a query, which is a set of criteria that describes a particular student population
- Available in each module in functions such as print, export, and multiple entry
- Can have fixed values or prompt for values each time you use the query
- Use pre-defined queries included in EDEExpress or create your own unique queries

# How do I...

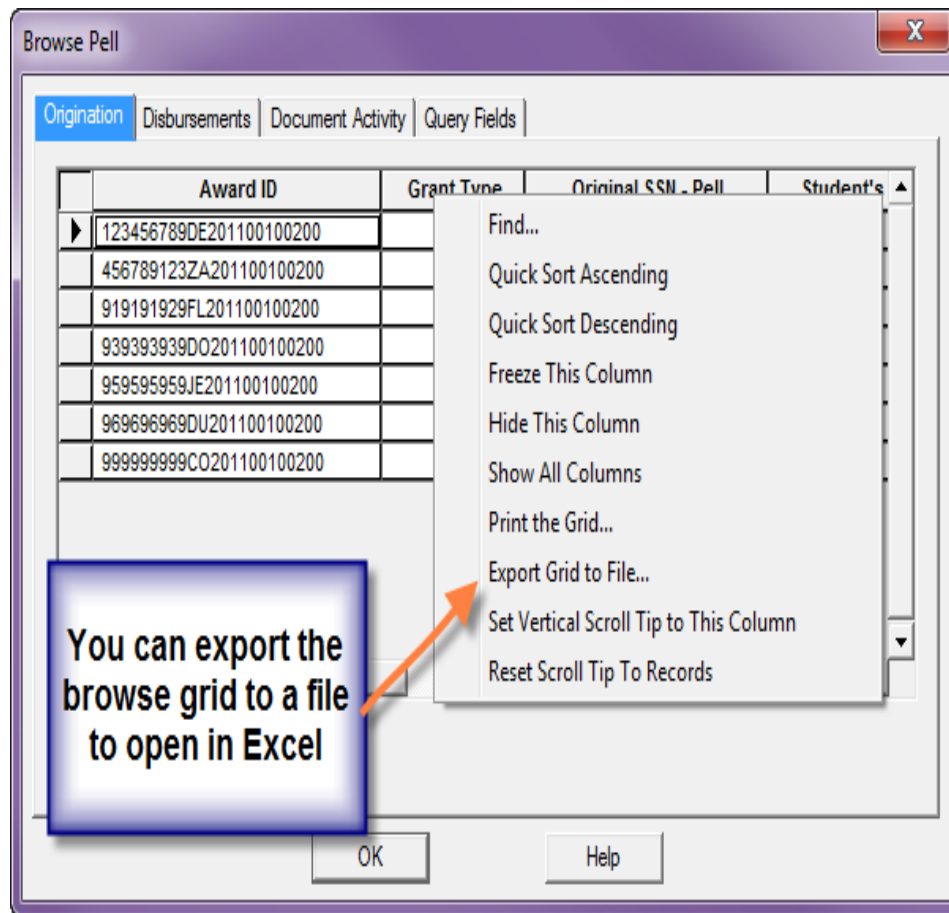
## View lists of records?

- Use browse to view data in a spreadsheet format
- Allows ease of viewing, searching, printing, and exporting multiple records
- Query fields available for each module are also viewable in Browse

# How do I...

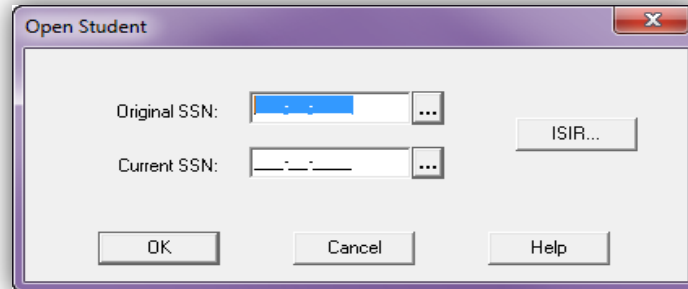
## View lists of records?

- On the browse grid, click the **right mouse button** in a column heading to display a menu of options you can use to sort and find records

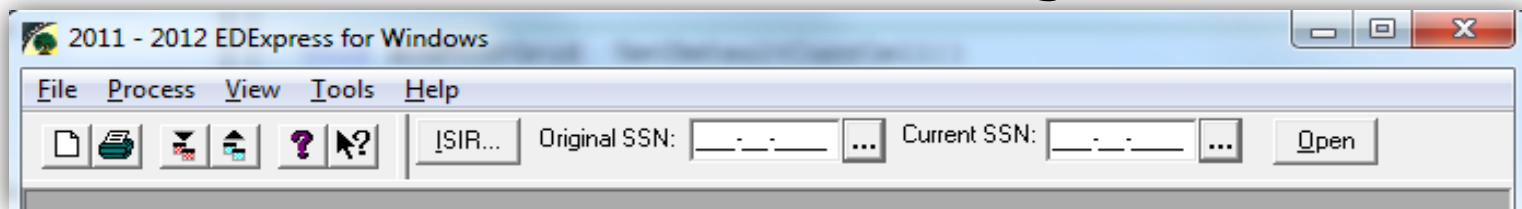


# What's coming in 2011-12?

- In 10-11, use a dialog box to open records
  - If a student record is already open, you must close it before opening another record



- In 11-12, use a new toolbar to open records
  - If a student record is already open, switch to a new record without first closing the current record



# What's coming in 2011-12?

- DL ISIR and Packaging Imports will create multiple loan types in a single import

The screenshot shows the 'Import' dialog box with the 'Loan Data - ISIR' option selected in the 'Import Type' dropdown. The 'Report To' section has 'Printer' selected. The 'Include Special Circumstances Flag 4?' checkbox is unchecked. The 'Prompt for Duplicates?' checkbox is checked. The 'Loan Type to Create' list has 'Direct Unsubsidized' selected. The 'DL Code' is '-R'. The 'Disbursement Profile Code' is empty. The 'OK' and 'Cancel' buttons are at the bottom.

Select one or more loan types to create.

In Loan Data - Packaging import, if you do not select any loan type, a loan is created for each loan type packaged for the student.

The screenshot shows the 'Import' dialog box with the 'Loan Data - Packaging' option selected in the 'Import Type' dropdown. The 'Report To' section has 'Printer' selected. The 'Include Special Circumstances Flag 4?' checkbox is unchecked. The 'Prompt for Duplicates?' checkbox is checked. The 'Loan Type to Create' list has 'Direct Unsubsidized' selected. The 'DL Code' is '-R'. The 'Disbursement Profile Code' is '-R'. The 'Selection Criteria...' button is at the bottom right. The 'OK', 'Cancel', and 'Help' buttons are at the bottom.



# What's coming in 2011-12?

- New fields will be added to the Demo tab to allow entry of Ability to Benefit data
- When entered, Ability to Benefit data will be sent to the COD System for all award types (DL, Pell, and TEACH)
- Existing Demo tab fields will be reorganized to accommodate the addition of Ability to Benefit fields

# Training and other Help

- At this Conference:
  - EDEsuite Hands-On (EDEExpress, DL Tools, SSCR): Session 13
  - Using EDEExpress for Experienced FAAs: Session 12
  - Using Direct Loan Tools to Reconcile your Direct Loan Data with the Common Origination and Disbursement System: Session 16
  - PC Lab



# Training and other Help

- [www.fsadownload.ed.gov](http://www.fsadownload.ed.gov)
  - EDEExpress Desk References/Cover Letters/Installation Guides
  - Technical References
- [www.ifap.ed.gov](http://www.ifap.ed.gov)
  - EDEExpress Online Training for 2010–11
  - Publications
- EDEExpress Help Text



# EDExpress Technical Assistance

## CPS/SAIG Technical Support:

- Phone: 800-330-5947
- TDD/TTY services: 800-511-5806
- E-mail: [CPSSAIG@ed.gov](mailto:CPSSAIG@ed.gov)
- Representatives are available Monday through Friday, 8 a.m. to 8 p.m. ET

# Contact Information

We appreciate your feedback and comments. We can be reached at:

Bob Martin

- Phone: 214-661-9454
- E-mail: [Bob.Martin@ed.gov](mailto:Bob.Martin@ed.gov)

Jody Sears

- Phone: 202-377-3604
- E-mail: [Joellen.Sears@ed.gov](mailto:Joellen.Sears@ed.gov)